

**PQS QUALIFICATION SHEET**

**Officer Programs Officer (OPO) Module**

<b>Name of Trainee</b>	<b>Qualification Start Date</b>	<b>Qualification Due Date</b>

<b>PQS Standard</b>	<b>Trainee (Signature)</b>	<b>PQS Qualifier (Signature)</b>	<b>Date</b>
1. Training			
2. Security			
3. Departmental Inspections			
4. Officer Recruiter Production Management System (ORPMS)			
5. Campus Data Notebooks			
6. Marketing Operations Plan			
7. Goaling (AC and RC)			
8. Local Effective Accession Delivery System (LEADS)			
9. Military Evaluations & CIVPERS Management			
10. Administration			
11. Government Vehicles			
12. Awards Recognition Programs			
13. Military Conduct on Recruiting Duty			
14. Final Qualifications			

9 Nov 2010

	Discuss/ Initial			Demonstrate/ Initial			Remedial/ Re-qualify		
	T R A I N E E R	T R A I N E E R	D A T E	T R A I N E E R	T R A I N E E R	D A T E	T R A I N E E R	T R A I N E E R	D A T E
<b>1. Training (COMNAVCRUITCOMINST 1131.2, 1136.2, 1500.4, 1500.8 and 5400.2)</b>									
a. Explain purpose and timing for conducting OR, OPL, OPA PQS.									
b. Accurately access and evaluate training of departmental personnel using individual training jackets.									
c. Discuss the purpose of the OPO Department's Departmental/Divisional Training Binders to include required documentation.									
d. Explain purpose of GMT and how to find required topics on the NKO Web page.									
e. Explain when/how to conduct and document departmental indoctrination of OPO Department Personnel.									
f. Explain how to identify a Recruiter's production weakness and providing OJT toward the specific production weaknesses.									
g. Train and counsel Recruiters in the following areas:									
(1) Officer Program Eligibility Requirements for Active and Reserve Officer Programs									
(2) MOP (Purpose and Documentation)									
(3) Prospecting/Marketing (all methods)									
(4) Motor Voter Program Requirement									
(5) Hospital Visits/Work Force									
(6) PSS, to include when Officer Recruiters should attend the Professional Selling Skills Applications (PSA) Course.									
(7) Kit Preparation/Quality Control									
(8) Applicant Processing									
(9) Applicant Reserve Affiliations/Medical Reservation Management									

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(10) Kit tracking using OTools (Active/Reserve)									
(11) LEADS (Local/National/Referrals) - Proper Disposition procedures									
(12) Collegiate Management - Frequency of Required Visits and reports									
(13) OTools (Add Record - Attach Kit - Request Next Action - SQL Queries, etc.)									
(14) Recruiting Aid Devices (RAD)/collateral materials - How to Order/Purpose									
(15) MEDVIPS, NUCVIPS and EOVS VIPS									
(16) How to file OPE using DTS									
(17) Commissioning and Enlistment Procedures									
(18) Diversity Recruiting									
(19) Campus Liaison Officer									
(20) Physician Speakers Bureau									
(21) Professional School Liaison Officers (PSLO)									
(22) Reserve Bonus procedures (medical and non-medical)									
(23) Procedure on securing a billet for a new SELRES									
(24) Physical procedures (active and reserve)									
(25) Electronic Joint Personnel Adjudication System (JPAS). JPAS procedures and LIVE SCAN (Fingerprinting)									
(26) Recruiting Quarterdeck Access and Functions									
(27) Explain Medical Recruiter Academy (MRA) (what, who attends, when and its purpose)									
(28) Conduct a PSS Sales Lab									
(29) Explain and Demonstrate completion of Training Record spot-checks (refer to COMNAVCRUITCOMINST 1500.4 series)									

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(30) Complete Privacy Act training 101, 102 & 103.									
<b>2. Security. Know current directives for security and accountability of the following items: (COMNAVCRUITCOMINST 1131.2 and 4400.1)</b>									
a. APEX/ASTB test materials to include test administration and sub-custody to NORS									
b. Vehicles and credit cards									
c. Active and Reserve Applications and Residual Files									
d. Facilities security									
e. Minor Property									
f. Computers/Protection of Privacy Act/PPI material									
<b>3. Departmental Inspections (COMNAVCRUITCOMINST 5040.2)</b>									
a. Conduct an OPO Department inspection using the current checklist per COMNAVCRUITCOMINST 5040.2 (to include all OPO production and processing offices detached from the District HQ)									
b. Develop and track a POA&M to ensure correction of inspection discrepancies									
<b>4. Officer Recruiter Production Management System (ORPMS). Demonstrate a thorough knowledge of ORPMS to include: (COMNAVCRUITCOMINST 1131.2)</b>									
a. Analyzing the MOP monthly planning calendar and annual goaling letters to direct adjustments to OPO Department operations to ensure goal attainment									
b. Conducting Bi-weekly Production Reviews with OR and provide CO/XO with OPO processing projection/update									
(1) Discuss Officer Production Review for an off-site recruiter									

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c. Complete an Officer Snapshot Report and route it to the Commanding Officer									
d. Completing a Navy Officer Recruiting Station (NORS) Assist Visit Checklist (COMNAVCRUITCOMINST 1131.2 Exhibit 050204)									
e. Discuss Officer Production Analysis Training and Evaluation (OPATE)									
f. WEB Based Recruiting Tools (WEBRTOOLS) (COMNAVCRUITCOMINST 1131.2C) Demonstrate the ability to:									
(1) Create, update and document an applicant data/prospect record to include blueprinting, contact history, referrals, awards etc.									
(2) Update a Collegiate record									
(3) Describe the recruiter's responsibility for data record location									
(4) Demonstrate the basic operation of the Prospect Record System (to include the Working Tickler and all market segments)									
(5) Explain how Local and National LEADS are loaded into WEBRTOOLS and how to properly document the disposition for each and return the required feedback information									
(6) Demonstrate how to do a last name lookup									
g. Evaluate Active and Reserve kit quality									
<b>5. Campus Data Notebooks (COMNAVCRUITCOMINST 1131.2)</b>									
a. Explain and discuss the sections of a Campus Data Notebook									
b. Explain items to be included in the COI Section									
c. Explain requirements for OPO review of Campus Data Notebooks									
d. Explain Priority 1, 2 and 3 schools and their significance									

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e. Explain items to be included on Collegiate Rosters									
f. Discuss Post Prospecting Activity Reports to be filed in the Campus Data Notebooks									
<b>6. Marketing Operations Plan (COMNAVCRUITCOMINST 1131.2)</b>									
a. Demonstrate the ability to develop the OPO section of the MOP									
b. Be able to:									
(1) Determine out of limits conditions for Active and Reserve programs									
(2) Document, evaluate POA&M accomplishments									
(3) Develop and evaluate work lists, action items, and calendar of events for each recruited program									
c. Use market and territory analysis to determine Fair Share Market Goals									
d. Explain the importance of Officer Recruiters maintaining a copy of the MOP and discussing changes to it at the Bi-Weekly Production Meetings									
<b>7. Goaling AC and RC (COMNAVCRUITCOMINST 1131.2, NAVCRUITREG and NAVCRUITDIST Goaling Notice)</b>									
a. Explain the Region's goal distribution process.									
b. Be able to prepare historical data and market data to defend District share of goal.									
c. Distribute District goals to recruiters using historical data covering past three years.									
d. Discuss the issuing and quarterly requirements for Officer Recruiter Goaling Letters									
<b>8. Local Effective Accession Delivery System (LEADS) (COMNAVCRUITCOMINST 1140.3 and 1131.2)</b>									
a. Describe the functions and responsibilities of the LEADS Production Team (LPT)									

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b. Explain local and national LEADS									
c. Determine LEADS conversion ratios									
d. Explain how to determine overdue Officer LEADS and proper disposition of a LEAD									
e. Explain actions available to reduce the number of overdue Officer LEADS.									
f. Determine contribution to goal and explain the OPO's role in field conversion									
g. Explain actions available to increase contribution to goal and conversion ratios									
h. Understand the OPO's responsibilities for formulation of the Ad plan									
i. Determine percent market identified for the NAVCRUITDIST									
j. Coordinate with the LPTS to generate additional LEADS and adjust the MOP to support goal attainment									
k. Explain how to get school lists and State Licensure Lists									
l. Explain the process to refer NBQ or Non-Competitive Contacts/Applicants to the EPO Department									
m. Explain the process to conduct interviews on 16K personnel referred by the EPO Department									
n. Explain the ADCO's function									
<b>9. Military Evaluations &amp; CIVPERS Management (COMNAVCRUITCOMINST 5400.2, COMNAVCRUITCOMINST 12450.2 and BUPERSINST 1616.10). Demonstrate the ability to:</b>									
a. Submit input, review, and write officer, enlisted, and civilian evaluations.									
b. Know reporting periods and District command procedures for evaluation submission.									

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c. Complete General Schedule (GS) 101 and Performance Management: A Tool to Achieve Results at the following link <a href="http://www.cpms.osd.mil/nsps/transition/">http://www.cpms.osd.mil/nsps/transition/</a>									
d. Explain and demonstrate knowledge of OPL and OP (civilian) position descriptions (PD) and reporting and evaluation requirements.									
e. Write civilian awards									
<b>10. Administration (COMNAVCRUITCOMINST 1131.2, 1100.8 and 5400.2). Explain the purpose and function of the following items:</b>									
a. Recurring reports									
b. Officer Recruiting Post Prospecting Activity Reports									
c. Marketing Operations Plan									
d. Annual Budget Request/Plan									
e. Annual COMNAVCRUITCOM/NAVCRUITDIST Advertising Plan									
f. CLO Program									
(1) FITREP requirements									
(2) LEAD generation									
(3) Required Meetings with CO/XO and/or OPO									
g. Navy Bands/EOV									
h. Have a thorough working knowledge of the following Publications and instructions:									
(1) COMNAVCRUITCOMINST 1131.2 (CRUITMAN-OFF)									
(2) COMNAVCRUITCOMINST 5400.2 (SOPMAN)									
(3) COMNAVRESFORINST 1001.5									
(4) COMNAVCRUITCOMINST 1500.4									



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(5) COMNAVCRUITCOMINST 5040.2									
(6) COMNAVCRUITCOMINST 1140.3									
(7) COMNAVCRUITCOMINST 1100.8									
(8) Other applicable instructions/notices									
i. Ombudsman Program									
j. Financial Counseling Program									
k. Alcohol and Drug Abuse Management Seminar (ADAMS)									
l. Civilian Performance Appraisal Review/Position Description/Award System									
m. Explain how OPO budget inputs are obtained and compiled into the NAVCRUITDIST budget input and submitted via the chain of command.									
n. Conduct an OPO Department Production Meeting.									
o. Explain OPO Department Collegiate Management									
(1) Required contacts									
(2) Adverse reports									
(3) Urinalysis requirements									
(4) PFA requirements (to include pre-OCS PFAs) and Hold Harmless Agreement									
p. Explain CANREC hiring procedures (BUPERSINST 1001.40)									
<b>11. Government Vehicles. (COMNAVCRUITCOMINST 1131.2 and 4400.1)</b>									
a. Explain vehicle safety requirements and correct operating procedures.									
b. Conduct a vehicle safety inspection.									
c. Define misuse of a government vehicle.									

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d. Explain domicile to duty policy.									
e. Explain accident-reporting procedures.									
<b>12. Awards Recognition Programs. Explain the following procedures: (COMNAVCRUITCOMINST 1650.1 and 12450.1)</b>									
a. Awards Recognition for outstanding officer and enlisted recruiting personnel assigned to the OPO Department									
b. Recruiting Command Advancement Program (RCAP)									
c. Initiate Medals, Awards and other congratulatory correspondence.									
d. Gold Wreaths (awarding requirements)									
e. Identify and explain COMNAVCRUITCOM/NAVCRUITREG/NAVCRUITDIST Officer Recruiting "R".									
f. Civilian Awards									
<b>13. Military Conduct on Recruiting Duty</b>									
a. Recruiting Ethics									
(1) Penalty for knowingly Enlisting/Commissioning Ineligible Applicants									
(2) Recruiting Promises									
(3) Reporting Recruiting Irregularities									
(4) Fraternization									
b. Conduct with Applicants									
(1) Sexual Harassment and Discrimination									
c. Concealing Applicant Information									
<b>14. Final Qualifications</b>									
a. Must be OR qualified									

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b. Must complete NAVCRUITCOM ORIENT UNIT OPO Course prior to OPO PQS Board certification.									
c. Recommend attendance at Medical Recruiter Academy (MRA).									

**15. Record of Qualification:**

a. Recommended for PQS Qualification Board. Date: \_\_\_\_\_

I, \_\_\_\_\_, certify that \_\_\_\_\_  
(Name/Rate/Qualifier Position) (Name/Rate)  
is ready for final qualification by a PQS Board for the position of Officer Programs Officer.

Qualifier's Signature \_\_\_\_\_

b. Qualification Board: Date: \_\_\_\_\_

We certify the examinee to be fully qualified for the position of Officer Programs Officer.

\_\_\_\_\_  
Board President (Name/Rate/Position)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
Region OPO (Name/Rate/Position)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
Board Member (Name/Rate/Position)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
Board Member (Name/Rate/Position)

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(Signature)

\_\_\_\_\_  
Board Member (Name/Rate/Position)

\_\_\_\_\_  
(Signature)

c. Reviewed: Date: \_\_\_\_\_

PQS Training Officer, NAVCRUITDIST \_\_\_\_\_  
(Signature)

d. Approved: Date: \_\_\_\_\_

Commanding Officer, NAVCRUITDIST\_\_\_\_\_

(Signature)

e. Service Record Entry (Page 4)

Date: \_\_\_\_\_

Chief Administrator, NAVCRUITDIST\_\_\_\_\_

(Signature)

You are hereby granted an extension. Your new maximum qualification date is  
\_\_\_\_\_. (Attach a copy of extension request with justification).

\_\_\_\_\_  
PQS Training Officer

Copy to:  
Member's Training Record